

EU'S EXPOSURE TO THE HORMUZ CRISIS: CRITICAL IMPORTS FROM THE GCC



GCC share in all extra-EU imports (%)

by quantity (million tonnes [Mt]), 2025

56% 10.2 Mt



Jet Fuel, Kerosene (27101941)



MINERAL FUELS & OILS

Aviation

36% 0.7 Mt



Cyclic Hydrocarbons (2902)



ORGANIC CHEMICALS

Pharmaceuticals · Plastics · Solvents

35% 32 Mt



Refined oil (2710)

MINERAL FUELS & OILS

Transport · Heating fuels

31% 0.7 Mt



Polypropylene (3902)

PLASTICS

Automotive · Packaging · Medical devices

24% 1.3 Mt

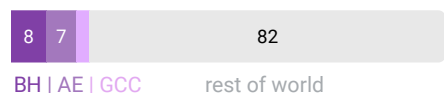


Polyethylene (3901)

PLASTICS

Packaging · Construction · Consumer goods

18% 1.2 Mt



Unwrought Aluminium (7601)



CRITICAL RAW MATERIALS

Manufacturing · Construction · Aerospace

16% 2.1 Mt



Helium (28042910)



CRITICAL RAW MATERIALS

Semiconductors · MRI scanners · Fibre optics

11% 7.2 Mt



LNG (27111100)



MINERAL FUELS & OILS

Power generation · Heating

Over half of EU jet fuel imports depend on the GCC.

Key industrial inputs (plastics, petrochemicals, aluminium) significantly exposed to disruption.

Higher risk



IEA warned in mid-April that Europe has around 6 weeks of **jet fuel** left. Major European airlines have cancelled thousands of flights due to the rising fuel prices.



Helium is on the EU list of critical raw materials. Qatar is the world's second largest producer and the main supplier to the EU. Critical for high-tech & medical applications.



Cyclic hydrocarbons are key for the EU's industrial base, including the chemical and pharmaceutical industry. Saudi Arabia supplies over 1/3 all extra-EU imports.



Qatari **LNG** helped to decrease EU's reliance on Russia but export is fully dependent on Hormuz. The recovery of Qatar's Ras Laffan facility will take up to 5 years.



Aluminium is categorised as a critical raw material by the EU. GCC, mainly Bahrain and UAE, accounts for 23% of global aluminium supply (excl. China).



Most exposed



Belgium



Italy



France



Netherlands



Germany



Spain



DISCOVER MORE FROM EGIC



Other Infographics

Analyses

Weekly Euro-Gulf Monitor

StratEGIC Monthly

Gulf History Portal

The Gulf Bridge: Monthly Newsletter

ABOUT

Headquartered in Rome, Italy, the Euro-Gulf Information Centre (EGIC) is a non-profit, non-partisan, think-and-do tank, established on 1 October 2015. The Euro-Gulf Information Centre blends research and analyses with outreach and engagement. We are proud of being an action centre that contributes to enhancing strategic, cultural, economic and political ties in the Euro-Gulf space. Through specialised platforms, programmes and activities, EGIC works hard to develop human-to-human and institution-to-institution contact points in order to strengthen relations and constructive engagement.

EGIC also provides information services to organisations and individuals that seek to deepen their understanding of the trends unfolding in both Europe and the Gulf. EGIC is a firm believer in breaking paywalls and provides open access information – infographics, articles, reports (etc) – to the interested public. Finally, EGIC organises a wide assortment of events ranging from conference and seminars to workshops, art exhibitions, travels and specialised training.



EGIC HQ:

- Via Gregoriana 12, Rome 00187, Italy
- +39 06 89569 839
- info@egic.info

CONNECT

- www.egic.info
- EGIC_
- [egic.info](https://www.facebook.com/egic.info)
- [egic_info](https://www.instagram.com/egic_info)
- EGIC

Think strat **EGIC**.